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**DCSS P3 PROJECT  
CLIENT ACCESS WORKGROUP  
AUGUST 30, 2000 MEETING  
MEETING SUMMARY**

**A. GENERAL**

On Wednesday, August 30, 2000, the California Department of Child Support Services (DCSS) Policies, Procedures, and Practices (P3) Project, Client Access Workgroup held its third official session in Sacramento. The following members attended:

- ☒ Bill Kirk, State Co-Leader (DCSS Supervisor)
- ☒ Corilynn Breitwisch, County Co-Leader (DIC Call Center---Los Angeles)
- ☒ Lucila Rolon, State Analyst (DCSS Analyst)
- ☒ Robert Bash, County Analyst (Manager---Tulare)
- ☒ Faye Thomas, Small County Rep (Director---Amador)
- ☒ Dianne Seno, Medium County Rep (Supervisor---Ventura)
- ☒ David Norwood, Large County Rep (Supervisor---San Diego)
- ☒ Rumyana Tassev, Advocate (ACES Leader)
- ☒ Betty Nordwind, Advocate (Executive Director---Harriett Buhai Center)
- ☒ Connie Jimenez, Judicial Council Rep (Facilitator---Santa Clara)
- ☐ Ron Dotta, FTB Rep (CAMP)
- ☒ Sandy Trigg, FTB Rep (CCSAS Information Systems Analyst)
- ☐ Ed Kent, FTB Rep (CCSAS Child Support Specialist)
- ☐ Judi Bentzen, FTB Rep (CCSAS Child Support Specialist)
- ☒ Renee Bastien, CSAC Rep (CMO Analyst---San Bernadino)

Attending *ex officio* were:

- ☒ Julie Hopkins, Facilitator (SRA International)
- ☒ Nora O'Brien, Advocate (ACES)
- ☐ Pat Pianko, Resource (OCSE---Region 9)
- ☐ John Schambre, Resource (OCSE---Region 9)

This meeting summary highlights points covered, material discussed, decisions made, and follow-up tasks for forthcoming sessions. Comments and corrections should be addressed to Julie Hopkins at [julie.hopkins@dss.ca.gov](mailto:julie.hopkins@dss.ca.gov).

Nora O'Brien attended from ACES and introduced herself. Nora advised that she was on several other workgroups and wanted to sit in on this group for informational purposes.

**B. REVIEW OF LAST MEETING'S MINUTES**

The discussion began with a review of the survey instruments that had been developed at prior sessions. The surveys had been submitted to P3 Leadership for approval; the Leadership had responded that no more surveys would be conducted by the P3 workgroups,

as a comprehensive DCSS survey would be distributed in the near future. The group could survey a representative sample of small, medium and large counties; it was agreed that this would not be necessary, as we already have representation from this constituency within the group.

The group agreed that we had directed our proposed surveys to the proper groups. The questions we had developed had been quantified and approved by the group. It was decided that the draft surveys would be included in our recommendations to the DCSS, as a basis upon which the DCSS can build its surveys.

### **C. TODAY'S TENTATIVE AGENDA**

- Complete matrix identifying access methods/measurements
  - Survey existing methods
  - Examine our ideal
  - Best practices search
  - Think big . . . visualize statewide
- Develop priorities with respect to different customers
- Develop recommendations for the “ideal” model

### **D. FTB CALL CENTER TOUR**

The group turned to a discussion of the group's visit to the FTB Call Center. On August 29, 2000, members of the group toured the call center and then had a question and answer session with Call Center staff. Cory indicated the tour had gone very well and that they were there almost three hours. When questioned as to how the FTB center compared to the LA call center, Cory indicated that LA did about half the amount of calls and that they did not have the same level of technical expertise available. The LA center is also suffering from growing pains. LA's call center is in its infancy when compared with FTB on a technical level. She felt it was very beneficial because the tour confirmed some of the points she had been trying to make to their administration.

There was some comment on the ability of the FTB to answer the questions at first contact and how helpful that was. The group was very impressed with the “one and done” philosophy; one call is made, and all issues are resolved at that point.

Some group members felt that call centers were clearly the way for Family Support offices in the future, but that the call center in LA reflected all the problems within the system. Problems could often not be handled even though the calls were answered; the need for return calls negates much of the benefit of a call center. The ability of a call center to handle inquiries at the first contact is a direct reflection of the strength or weakness of the office. There was a concern among some group members that call centers be seen as a panacea for all county client access issues. It was agreed that call centers were one of many mechanisms available to clients to obtain access to case and educational information.

Training of call center staff was a major topic of discussion. Often in child support offices, the least trained or qualified staff are those who are answering the phone. They have neither the knowledge nor expertise to handle client inquiries. It was agreed that extensive training of call center staff would be an integral factor in the success of call centers throughout the state. FTB worked on a very organized system and recognized the problems employees would have to handle. FTB planned for each possibility and had a commendable approach to assisting staff in solving those customer problems. It was very clear that FTB had invested a great deal in its call center staff; the call center staff were brimming with enthusiasm, and took a great deal of pride in their ability to handle customer concerns. FTB management went so far as to state that if you invested in your people they would come through for you.

The group agreed that call centers, whether regional or county-based, would be a requirement at some time in the future. However, a great deal of planning and training would have to be invested in order for call centers to be successful in providing meaningful, useful access for customers.

## **E. RESEARCH AND INFORMATION REPORTING**

Robert reported out on the presentation to the Steering Committee. The Committee had requested that our recommendations be set out in three areas: short, intermediate and long term. Short-term recommendations could be implemented immediately, intermediate within two to three years, and long-term beyond that time. The group agreed to review its recommendations to ensure that timeframes were included.

Robert and Renee then reported on items of interest from other workgroup minutes. The Management Practices group had touched on several items that we had covered, including board communications, inappropriate referrals from other agencies, and interagency communications.

## **F. RECOMMENDATIONS AND DELIVERABLES**

The group discussed the final recommendations, including the format of the report and the actual deliverables and/or recommendations toward which the group is working. Client Access Recommendations/Deliverables have been defined as follows:

1. Definitions of Customer Groups (**Complete**)
2. Survey Recommendations (**Complete**)
  - Program constituencies to be surveyed
  - Draft surveys for each constituencies
3. Identification of Access Methods: Minimum to Ideal Standards
  - Implementation Requirements: Short, Intermediate, and Long-term
  - Funding and resource issues
  - Justification
  - Constraints
4. County-designated Points of Contact

- Customer service issues
  - Intercounty communication
  - Client access issues
  - Utilize existing or form new Public Outreach Committee
5. Client Access Task Force - to continue work of this group
  6. Development of a Customer Service Mission Statement
    - Suggestions for indoctrinating state and county staff to a new customer service philosophy

All group members will review prior meeting minutes to identify additional recommendations, suggestions or issues that should be incorporated into the group's final report.

## G. IDENTIFICATION OF ACCESS METHOD STANDARDS

Using the matrix that had been completed in the prior session, we broke into four groups and began work on identifying standards and timeframes for access by the various customer groups. Each group then reported out on its recommendations, so that the entire workgroup could come to consensus on the recommendation. Each group was to define the access method, determine the level of service to be provided and the timeframe for implementation, and identify any resource issues.

### Government Access Standards

Access Method	Definition	Level of Service	Timeframe for Implementation	Resource Issues
Phone	Direct phone access to live person	8 to 5; M-F Targeted publication	Short-term (w/i 6 mos. of regulation eff. date)	Existing line or additional line (dedicated)
E-mail	General address for local child support agency (LCSA)	24 hours a day; 7 days a week (24/7)	Short-term	Existing or new e-mail address
FAX	General FAX # for LCSA	24/7	Short-term	Existing or new
Letters Correspondence	Same mailing address; special handling instructions (internal procedures)	Regular mail delivery	Short-term	Staff time dedicated to meet special processing requirements
Appointments	Management Task	As needed	Short-term	Dedicated staff time
Voice mail	Recorded phone-	24 /7	Short-term	Availability of VM system

	messaging cap.			
Call Center	Unnecessary			
VRU	Automated voice response with dedicated government option	24/7	Intermediate to long-term	Existing or new system
Hot lines/unique access lines	Dedicated phone lines to specified functions	8 to 5, M-F	Intermediate	Additional phone lines; possible additional staff
Interagency Communication	Incorporated in all the above			

### Case Member Access Standards

Access Method	Definition	Level of Service	Timeframe for Implementation	Resource Issues
Phone	Direct phone access to live person	Caseworker follow-up w/I 24 hrs of initial contact 8 to 5; M - F	Short-term	Call volume; staffing constraints
Call Center	Dedicated staff with training and skills to resolve 80% of issues (one and done idea)	Staggered hours (7 to 7; M-F and 9 to 4 on Sat)  800 #	Long-term	Staffing; Funding. Consider regional call centers in smaller counties
VRU	Automated system in addition to call center staff	24/7 Info: payments; general announcements; some case specific	Intermediate	Funding
FAX	Incoming and outgoing	Deal with as correspondence: Triage, immediate reply as necessary. Required resp w/i 21 workdays	Short-term	Volume

<b>Access Method</b>	<b>Definition</b>	<b>Level of Service</b>	<b>Timeframe for Implementation</b>	<b>Resource Issues</b>
Walk-in, appointments	Customers have access to caseworker or other knowledgeable staff, w or w/o appointment	All business hours; Evening or Sat. extended hours 7:00 p.m. evenings, open during lunch hours	Intermediate	Additional staff; security issues
Legal Process/ courts	Ability to access court (get hearing) in reasonable time	30 to 60 days to get hearing	Intermediate	Funding and Resources: Commissioners and caseload size
Service sites; co-location; one-stop centers	Provide case specific information at location other than child support offices	Hours consistent with specific site	Intermediate	Staffing
Voice mail	Recorded phone messaging capability	24 /7	Long-term	Availability of VM system; staff ability to handle large call volume
<b>Not addressed as yet, due to time constraints:</b>				
E-mail				
Internet				
Kiosks, Libraries, Mall Info Booths				
FSDmobile				
Military Bases				
Hospitals				
Correctional Facilities				
Schools				
Community Meetings, Fairs				
Radio, Cable TV				

Child Support Awareness Mo				
Outreach Coordinator				
EFT/Direct Deposit				

### Employers, FIs, Other Payors Access Standards

Access Method	Definition	Level of Service	Timeframe for Implementation	Resource Issues
Telephonic (Phone, voice mail, call center, IVRU, hot lines)	Dedicated staff with ability to problem solve & handle 80% of calls; IVRU – access to general and specific info on cases; Call centers with 800 numbers; hotlines with unpublished # and immediate response	Regular business hours for phone, and call center; other provide access 24/7	1 year except voice mail to be within 6 mos (Short-term)	Funding for small counties; additional staffing of analytical / technical person (small counties to share)
FAX	Stand alone machine run over phone lines; Processed as mailed correspondence	24/7	6 mos (Short-term)	None
Letters	Paper correspondence received via USPS or other carrier	Response and resolution w/I 1 week of receipt	6 mos (Short-term)	None
Outreach	Communication and education with stakeholder group	Info meetings; Correspondence, i.e., brochures; Develop “Bill of rights” defining service level expectations,	6 mos (Short-term)	None

		complaint resolution process		
Radio, Cable TV	PSA's – information about responsibility and obligations, consistent with statewide message; acknowledgeme nt of their contributions		1 year (Intermediate)	
Child Support Awareness Month	Include info for employers, FI, etc at activities	Annually	6 mos (Short- term)	
Outreach Coordinator	Develop standards for outreach program components; continue with committee work	Ongoing	6 mos (Short- term)	CFSC Public Outreach Committee
<b>Not addressed as yet, due to time constraints:</b>				
E-mail				
Internet				
EFT/Direct Deposit				

### Other/Third Parties Access Standards

A matrix was not created for this type of access, as the access was considered to be very general or educational in nature. This customer group does not include government officials or advocates. It is limited to the general public and non-authorized case inquiries. Most of the access methods identified above could be utilized by this customer group; we felt it more important to describe the characteristics of the material that would be available to this group.

- Limited case access because of confidentiality considerations
- Mostly public outreach efforts
- Standardization of materials when possible, i.e., VRU scripts, libraries

- Goal is consistency in content of education materials
- Direction from DCSS will be a high priority
- Dedicated Community Education Unit in counties to serve as resources, implementation unit and community liaisons
- Timeframe – at county transition

Members of the workgroup will review the meeting minutes to ensure that the above matrices reflect the group discussion. Corrections or changes will be discussed at the next session. Members are also to review the timeframes, so that we may come up with specific definitions for short, intermediate and long-term implementation of standards.

## **H. CROSS-WORKGROUP ISSUES**

Reported out in Section E of these minutes.

## **I. SYSTEM REQUIREMENTS**

None identified.

## **J. HANDOUTS**

- ACES Client Access Survey

## **K. ACTION ITEMS/HOMEWORK ASSIGNMENTS FOR NEXT SESSION**

- See attached listing.

## **L. ANCILLARY (PARKING LOT) ISSUES**

None identified.

## **M. ATTACHMENTS**

- Action Item List

## **N. TENTATIVE AGENDA FOR SESSION FOUR**

- Complete Client Access Standards Matrices
- Review action items
- County Designated POC
- Customer Service Mission Statement
- Draft Workgroup Report